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[439]

The figures of imports in 1938 in metric tons were as follows :—

Motor tyres	807
Motor tubes	69
Rubber footwear	221
Soft rubber (unvulcanised)	32
Rubber solution	27
Miscellaneous	173

4. Synthetic Rubber

It is planned to erect a plant with a capacity of 3,000 tons per annum in co-operation with German interest and using natural gas as the raw material. There is a second plan by independent interests to erect another plant at Ploesti using natural gas or oil as a starting point. Both these projects, however, are as yet in their initial stages and Rumania is, at present, entirely dependent on Germany for supplies of synthetic rubber.

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5. Cultivation of Rubber-bearing Plants

Rumania has been experimenting with the planting of *Kok Saghyz* or Russian dandelion. During 1942 an area of 180 hectares (450 acres) was planted, which it is estimated will eventually yield between 20 and 30 tons of rubber. It is planned to increase the planted area in 1943, but it will be some time before any results of these measures will help substantially to alleviate the Rumanian supply position.

[439]

6. Present Position (July, 1943)

Although Rumania has sufficient manufacturing capacity to supply most of her essential needs, she lacks supplies of raw materials. The industry is dependent upon Germany for supplies of synthetic rubber and some of her essential requirements of manufactured goods for her armed forces, such as aircraft tyres and some heavy truck tyres, are also being supplied by Germany.

C. HIDES, SKINS AND LEATHER

(1.) Pre-War Period

1. General

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Rumania's plentiful supply of livestock places her in a comparatively favourable position for hides, skins and leather and the pre-war slaughterings were approximately as follows :—

	'000 *Head*
Cattle	487
Calves	500
Horses	100
Buffaloes	32
Sheep	1,374
Goats	100
Pigs	798

Of the leather producable from the above animals, cattle, horse and buffalo are the most important, being used to a large extent in the manufacture of sole leather, which is the backbone of the industry.

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Rumania is not entirely self-supporting, although home-production enables her to restrict imports to a minimum. Imports and exports in 1937 were as follows :—

	Imports	*Exports*
	tons	
Hides of cattle (including calf and horse	2,030	Nil.
Other hides and skins (including sheep and pig skins)	541	557
Leather (including waste)	62	416

[35b]

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237 [439] The imported hides are in all probability largely heavy hides needed for sole leather. Those designated as "other hides and skins" are not important in tonnage, and exports are almost certainly all sheep and pig. The exports of leather are not very important, as they consist almost entirely of leather waste.

Total supplies of leather, available from internal slaughterings of cattle, calves, horses and buffaloes together with net imports, would be about 12,000 tons, of which 10/11,000 tons are derived from local hides and skins.

Part of the sheepskins were dewoolled and turned into leather, the wool being sold separately but a considerable number of skins was used as fleece-lined jackets by the peasants. The total quantity of leather from the locally-slaughtered sheep would, however, not exceed 750/1,000 tons.

Unlike Western countries, the pigs in Rumania are flayed, and the skins tanned, so that the pigskin industry is certainly of material value, although not of major importance, compared with Rumania's total leather production.

2. Manufacture

295 Rumania's leather trade made rapid strides in pre-war years and, as the bulk of the leather was made into footwear, an important increase in this production was noticeable. Although no official statistics are available, it is estimated that Rumania produced 45,000,000 pairs of leather shoes in 1936 and, in addition, considerable quantities of peasants' footwear were manufactured in country districts.

The industry at that time consisted of about 20 machine shoe factories, six of which were owned and controlled by tanneries, mainly centred in Cluj, Timisoara, Bucarest and Oradea. In addition, numerous small shops existed throughout the country in which shoes were made by hand. With the loss of Northern Transylvania the machine-shoe centres of Cluj and Oradea went to Hungary.

3. Tanning Materials

282 [439] Rumania has in the past relied on other countries for practically all her tanning materials and extracts. She used to import about 8,000 tons of different extracts, about 30 per cent. of which were re-exported from the U.K., probably quebracho and wattle extract. Yugoslavia supplied her with about 4,000 tons of extract, presumably oak and chestnut.

(B.) War-time Developments

1. General

Though Rumania has suffered during the war from a leather shortage, partly on account of reduced internal production, but more especially because of the increased requirements for the Armed Forces, this shortage has not been so severe as in most European countries.

It has been reported that the leather production in 1940 was 9,200 tons, but that the supply of raw hides fell from 19,000 tons pre-war to 11,000 tons in 1941. This is a severe drop, even assuming that the 19,000 tons included imported hides. A substantial decline in the available supplies of leather has, however, certainly taken place owing to the curtailment of imports, to clandestine slaughterings, and to exports of live cattle to the Axis.

An indication of the extent of supplies allocated for Army needs was contained in an official announcement that 68 per cent. of all untanned